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ARIZONA LABOR MARKET INFORMATION

NEWSLETTER

Vol. XIV No. 5
May 1990

Unemployment Rate

Seasonally Adjusted
March*

ARIZONA	–	5.2%
Maricopa Co.	–	4.3
Pima Co.	–	4.1
United States	–	5.2

Consumer Price Index

U.S. – March 1990
Base = 1982-84

Wage Earner/Clerical Worker	–	127.1
% Chg. Year Ago	–	5.2
All Urban	–	128.7
% Chg. Year Ago	–	5.3

Phoenix – 1st Qtr 1990
Base = 1982-84

All Urban	–	131.5
% Chg. Year Ago	–	6.3

Tucson – 1st Qtr 1990
Base = 1982-84

All Urban	–	130.1
% Chg. Year Ago	–	3.9

* Preliminary

Worker Benefits:

Employers Offering Wider Variety; Employees Having to Make More Choices

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Arizona Department of Economic Security
— Moving People Toward Self-Sufficiency

Family Care Becoming a Priority, BLS Survey Shows

Birth Leave, Child Care, Flexible Hours Among Worker Benefits Receiving Attention

Employee benefits received in 1989 focused more than ever on the care of family members, according to a survey by the U.S. Department of Labor's Bureau of Labor Statistics.

The Bureau's latest survey of benefits offered to full-time employees in medium and large companies shows that unpaid maternity leave was available to nearly two-fifths of employees; unpaid paternity leave to almost one-fifth; reimbursement accounts (to help pay for medical and dependent care expenses) to about one-fourth; and flexible work arrangements to one-tenth of employees.

The survey provides representative data for 32 million full-time employees in the contiguous 48 States and the District of Columbia. Benefit data represent workers in about 109,000 establishments employing 100 or more employees in private nonfarm industries.

Ninety-two percent of full-time employees had medical care benefits (such as hospitalization and care by physicians) fully or partially financed by their employer in 1989. The majority of participants (74 percent) having medical care benefits were in traditional fee-for-service plans.

Family Benefits

The care of family members in households where all parents are employed was addressed by employers in a number of ways in 1989. Family leave benefits — maternity and paternity leave, child care, flexible work schedules — as defined in the survey, are over and above other leave benefits, such as short-term disability coverage and paid vacations.

Thirty-seven percent of employees, the survey showed, could take unpaid maternity leave, with the maximum leave available averaging 20 weeks. Eighteen percent of employees could take unpaid paternity leave, with the maximum leave available averaging 19 weeks. Paid parental leave was rare.

Five percent of employees were eligible for child care benefits subsidized by their employer. This benefit includes both on-site or near-site child care facilities and reimbursement of employee child care expenses.

A more common means of assisting employees with child care expenses was through reimbursement accounts, from which employees pay for a variety of qualified expenses. Child care, elderly or dependent care, and other medical care expenses were the most common items covered by a reimbursement account. Twenty-three percent of employees were eligible for such accounts in 1989, up from 12 percent in 1988. Reimbursement accounts often are funded solely by employees seeking tax advantages through salary reduction arrangements.

For the first time, the survey included information on flexible work schedules. Limits on the amount of flexibility vary from plan to plan, but generally employees must be at work for a core of hours during midday. Eleven percent of workers studied had formal flexible work arrangements, with 15 percent of white-collar workers having flexible work schedules available to them, more than double the coverage for blue-collar workers.

Employers also offered a variety of health-related benefits outside the traditional health care plans. Employee-assistance programs, which provide counseling and referral services for substance abuse and family, financial, legal, and related problems, were available to 49 percent of workers. Wellness programs, designed to encourage healthier lifestyles, were available to 23 percent of workers. These programs typically include health screenings, smoking cessation classes, and guidance on healthier diets.

For the first time, the survey gathered data on the availability of long-term-care insurance. Three percent of employees had long-term-care insurance plans available to them in 1989. Such plans are designed to help pay for long-term nursing home care for employees or dependents, including elderly dependents. (Health care plans exclude such coverage from the benefits they provide.) Although these plans are typically wholly employee paid, workers gain because coverage is available through employers at group insurance rates.

Health Care Benefits

Ninety-two percent of full-time employees had medical care benefits (such as hospitalization and care by physicians)

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fully or partially financed by their employer in 1989. The majority of participants (74 percent) having medical care benefits were in traditional fee-for-service plans. Participation in non-traditional health care plans, such as health maintenance organizations (HMOs) and preferred provider organizations (PPOs), accounted for 17 percent and 10 percent of medical care participants, respectively.

Alcohol and drug-abuse treatment coverage was provided to 97 and 96 percent of the medical care participants, respectively. Benefits may be provided for detoxification and rehabilitation services, or both. The percent of medical care participants with alcohol and drug-abuse treatment coverage reported by the survey increased by 21 percent and 30 percent, respectively, between 1988 and 1989.

To reduce health care costs, many plans provide less costly alternatives to hospital care. Three-fourths of the participants with medical care had coverage for home health care, and four-fifths had coverage in extended care facilities. In addition, hospice care for the terminally ill was available to approximately two-fifths of medical plan participants.

Other features designed to curb health care expenses included incentives for diagnostic testing prior to hospitalization and a requirement of plan authorization prior to hospital admission. These two features affected slightly more than 40 percent of the medical plan participants. Nearly 60 percent of the participants were in plans that provided coverage for second surgical opinions.

Dental coverage, generally including preventive and restorative pro-

(Continued on page 4)

Table 1. Percentage of Full-time Employees in Selected Benefit Programs of U.S. Medium and Large Private Companies[1]

Benefit Program	All	Professional, Administrative	Technical, Clerical	Production, Service
Paid:				
Holidays	97	97	96	97
Vacations	97	98	99	95
Personal leave	22	28	30	14
Lunch period	10	4	4	16
Rest period	71	57	69	80
Funeral leave	84	87	86	80
Jury duty leave	90	95	92	87
Military leave	53	61	57	45
Sick leave	68	93	87	44
Maternity leave	3	4	2	3
Paternity leave	1	2	1	1
Unpaid:				
Maternity leave	37	39	37	35
Paternity leave	18	20	17	17
Sickness and accident insurance	43	29	29	58
Long-term disability insurance	45	65	57	27
Medical care	92	93	91	93
Dental care	66	69	68	65
Life insurance	94	95	94	93
Defined benefit pension	63	64	63	63
Defined contribution	48	59	52	40
Retirement[2]	36	43	39	31
Capital accumulation[3]	14	18	14	11
All retirement[4]	81	85	81	80
Flexible benefits plans	9	14	15	3
Reimbursement accounts	23	36	31	11

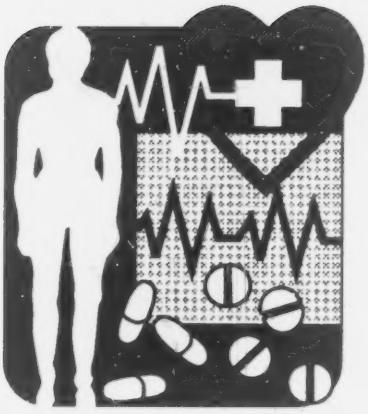
1. Survey coverage excludes executives and employees in constant travel status, such as airline pilots, as well as data for Alaska and Hawaii. Except for maternity and paternity leave and reimbursement accounts, benefits paid for entirely by the employee were excluded from the tabulations. Professional-administrative and technical-clerical workers are often discussed jointly as white-collar workers. Production-service workers are often called blue-collar workers.

2. Includes money purchase pension, profit sharing, savings and thrift, stock bonus, and employee stock ownership plans in which employer contributions must remain in the participant's account until retirement age, death, disability, separation from service, age 59-1/2, or hardship.

3. Includes plans in which participants may withdraw employer contributions from their accounts without regard to the conditions listed in footnote 2.

4. Includes defined benefit pension plans and defined contribution retirement plans. Many employees participated in both types of plans.

Source: U.S. Department of Labor, Bureau of Labor Statistics, March 1990



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cedures, was available to 66 percent of employees. Thirty-five percent of the medical plan participants had provisions for vision care. Nearly all vision care plan participants had coverage for eye examinations, while 68 percent had coverage for eyeglasses and 66 percent were covered for contact lenses.

Medical coverage for employees was fully paid by the employer for 52 percent of participants, while family coverage was fully paid by the employer for 34 percent of participants. (This is a decrease from 57 and 36 percent, respectively, in 1988.) When employee contributions were required, they averaged $25 per month for individual coverage and $72 per month for family coverage, up from $19 and $60 in 1988. Contributions varied by plan type, with participants in HMOs more often required to contribute than participants in fee-for-service plans.

Defined-Benefit Pension Plans

Defined-benefit pension plans, which specify a formula for determining an employee's annuity, covered 63 percent of full-time workers in 1989, unchanged from the coverage reported in 1988 when the survey expanded to smaller establishments and more service industries.

The most common type of defined-benefit pension plan in 1989 (64 percent) was the terminal earnings plan, which bases pension payments on an employee's average earnings in the last few years prior to retirement (usually a five-year period). The average benefit formula in such plans was approximately 1.5 percent of annual earnings times years of service (for example, 1.5 percent x 30 years of service, or 45 percent of annual earnings). More than half of the participants in these plans were subject to a limit on the years of service that could be applied toward the pension benefit, commonly 30, 35, or 40 years. In addition, benefits were usually coordinated with Social Security payments.

Earnings-based pension formulas are more common among white-collar workers than blue-collar workers. The latter often have plans calling for dollar amount benefits based on years of service. In 1989, the monthly benefit under dollar amount formulas averaged about $20 times the number of service years (for example, $20 x 25 years, or $500 a month). Unlike earnings-based plans, these plans usually do not limit years of credited service and rarely coordinate benefits with Social Security payments.

As a result of the Tax Reform Act of 1986, plan sponsors continued in 1989 the trend toward adopting shorter vesting schedules. Fifty percent of the participants in defined-benefit plans satisfied the requirement for 100-percent vesting after five years of service, up substantially from 5 percent reported in 1988. Most of the other participants were not fully vested until the completion of 10 years of plan participation.

Defined-Contribution Plans

Forty-eight percent of employees participated in one or more defined-contribution plans in 1989, up from 45 percent in 1988. These plans, which usually specify the employer's contribution but cannot predetermine the employee's actual amount of benefits, include savings and thrift (covering 30 percent of full-time workers), profit-sharing (16 percent), money-purchase pension (5 percent), and stock-ownership plans (3 percent). Most defined-contribution plans require employee contributions; about 30 percent of participants were in plans wholly financed by the employer.

Forty-one percent of the workers covered by the survey participated in 401(k) plans (also known as cash or deferred arrangements), which permit pretax employee contributions. Most of these plans were salary-reduction plans, allowing employees to reduce their taxable income by making voluntary contributions that are not taxed until withdrawn from the plan.

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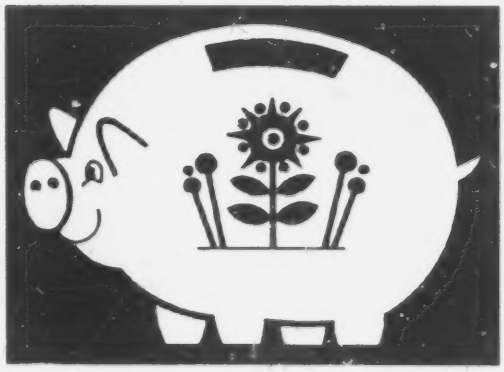

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Life Insurance

Life insurance benefits were provided to 94 percent of employees in 1989. The cost was paid entirely by the employer for all but 13 percent of covered workers. For 68 percent of the covered workers, the amount of life insurance was based on earnings, typically one or two times annual pay. Most of the remaining participants were provided flat dollar amounts of coverage. Flat dollar amounts were most common among blue-collar workers, with benefits for these workers averaging slightly more than $11,000.

Fifty-two percent of life insurance participants were in plans that reduced life insurance benefits for older employees, normally beginning at ages 65 or 70. Life insurance coverage, typically reduced, continued after retirement for 42 percent of participants.

Seventy-one percent of life insurance participants received accidental death and dismemberment insurance, which provides additional benefits in the event of death or disability caused by an accident. For 91 percent of workers with accidental death and dismemberment protection, benefits equaled basic life insurance benefits. The remainder had flat dollar benefit amounts.

Disability-Income Benefits

Eighty-nine percent of workers were covered by an income protection plan — either sick leave, sickness and accident insurance, or both — in the event of a short-term illness or injury. Sick-leave plans, available to 68 percent of all workers studied, but more frequently to white-collar workers, commonly specified a set number of sick days per year. Workers in such plans with one year of service had an average of 15.4 sick days available; this rose to 27.8 days at 20 years of service.

In 1989, 43 percent of workers surveyed received a sickness and accident insurance plan, and about half of these workers also received sick leave. Sickness and accident insurance, twice as prevalent among blue-collar workers than among white-collar workers, provides either a percentage of pay — commonly 50 percent — or a flat amount per week during a period of disability due to illness or accident. Payments are for a limited period of time, usually 26 weeks.

Forty-five percent of the employees had long-term disability insurance coverage in 1989. Such coverage is intended to replace income lost during an extended or permanent period of disability. The majority of workers with such coverage received between 50 and 60 percent of pre-disability pay during their period of disability.

Nearly all long-term disability insurance participants were in plans that covered disabilities due to mental illness. However, half were in plans that discontinued the benefit after a specified length of time, commonly 24 months, unless the recipient is institutionalized.

Paid Time Off

Time off with pay is available to employees in a variety of forms — from daily rest breaks to annual vacations of several weeks. Most types of paid leave were available to a majority of the employees. The exceptions were paid lunch time, averaging 26 minutes a day, which applied to a tenth of workers; and personal (multipurpose) leave, averaging 3.1 days a year, which covered nearly one-fourth of workers.

The number of paid holidays averaged 9.2 per year; the amount of vacation, which commonly increased with length of service, averaged 9.1 days after 1 year of service, 16.5 days after 10 years, and 20.4 days after 20 years. Paid rest time averaged 26 minutes a day; funeral leave, 3.3 days per occurrence; military leave, 11.9 days a year; and paid time off for jury duty was usually provided as needed.

Detailed tabulations of the benefit provisions studied will be published this summer in a BLS bulletin, Employee Benefits in Medium and Large Firms, 1989. Data are currently being collected for surveys of small private firms (those employing fewer than 100 workers) and state and local governments. Results of these surveys are scheduled for release in 1991.

— U. S. Department of Labor, Bureau of Labor Statistics

Yearly Survey Offers Comparison

How do Arizona's medium and large private companies compare to the rest of the country, in terms of employee benefits offered? One of the best sources of information is the *Joint Governmental Salary and Benefits Survey*, a yearly analysis of benefits of public and private employers in Arizona, conducted by the state's Department of Administration.

In 1989, 222 public and private employers responded to the survey, which asked questions on the following benefit areas: disability insurance, retirement, life insurance, medical insurance, dental coverage, and pretax savings plans. Every four years — the next is 1990 — a more detailed survey is conducted and includes the above benefit topics, along with data on holidays, annual leave, and sick leave.

A copy of the *Joint Governmental Salary and Benefits Survey* is available by contacting the Department of Administration at 542-5250; cost is $5. Information from the survey pertaining to only Maricopa and Pima counties is available at no charge in the annual *Employer Wage Surveys*, published by DES, Research Administration. One free copy of each wage survey is available by calling 542-3871.

Median Earnings in U.S. Rose 4.5 Percent in First Quarter

Following are summaries of news stories compiled from a variety of sources relating to labor issues affecting the nation and Arizona.

Median earnings of the nation's 83.8 million full-time wage and salary workers were $415 per week in the first quarter of 1990, an increase of 4.5 percent from a year earlier, the U.S. Department of Labor's Bureau of Labor Statistics (BLS) reports. Over the same period, prices rose 5.2 percent as measured by the Consumer Price Index for All Urban Consumers (CPI-U).

Other highlights from first-quarter data, which are collected as part of the monthly Current Population Survey, include:

- Women usually working full time had median earnings of $346 per week, 71 percent of the $488 median for men.
- Median earnings for black men working at full-time jobs were $364 per week, 73 percent of the median for white men ($501); median earnings for black women was 87 percent of the median for their white counterparts ($309 vs. $354); and median earnings of Hispanics continued to lag behind those for blacks ($313 vs. $331).
- Among men, workers in executive, administrative, and managerial occupations had the highest median earnings ($743), followed by those in professional specialties ($712); for women, median weekly earnings were highest for professionals ($533), followed by those in executive, administrative, and managerial jobs ($467).

Public Companies Fuel ESOP Growth

The number of employee stock ownership plans (ESOPs) increased by an estimated 830 in 1989 — 10 percent greater than in most previous years — according to the National Center for Employee Ownership in Oakland, Calif. The center, a non-profit membership and research organization, estimates there are now about 10,200 plans covering some 11.5 million U.S. workers.

Not only was the number of new plans up sharply last year, but the number of employees covered increased 20 percent, due partly to the rise of ESOPs being offered by public companies, particularly large corporations such as Sears, Mobil, Xerox, and Proctor and Gamble. Traditionally, public companies have only made up about 10 percent of ESOPs and were more common among smaller public firms.

NEWS IN BRIEF

"The growth of ESOPs in public firms has not been without some controversy," says the center's director, Corey Rosen, referring to companies that have been mentioned as takeover possibilities.

Information about the National Center for Employee Ownership is available by calling (415) 272-9461.

Perkins Act Goes to Conference Committee

U.S. Senate and House of Representatives' bills reauthorizing the Carl D. Perkins Vocational Education Act for five years were passed in April and May, respectively. The bills, which both increase increase yearly funding from the current $938 million to about $1.5 billion, were supposed to go to conference committee in mid-May to work out differences in the legislation. One of the major distinctions between the two bills is that the Senate's version would restrict state discretion in determining the split in funds between post-secondary and secondary education, while the House bill does not alter the current law, which does not mandate a specific state split. The Senate bill would require states to spend 65 to 75 percent of their federal program money on secondary vocational education programs.

LLSIL Guidelines for '90 Released

In mid-April, the U.S. Labor Department released its Lower Living Standard Income Level (LLSIL) Guidelines for 1990. LLSIL income levels are one of two ways — the poverty level is the other — used to determine whether individuals meet the "economically disadvantaged" standard for Job Training Partnership Act (JTPA) programs and the only criteria used to determine eligibility under the Targeted Jobs Tax Credit (TJTC) Program.

Persons are determined to be economically disadvantaged if their family income six months prior to application for the JTPA and TJTC programs was not in excess of the higher of the poverty level, or 70 percent of the LLSIL levels.

Following are the 70 percent levels of LLSIL, by family size, that are applicable for Arizona's metropolitan and non-metropolitan areas, in addition to the 1990 U.S. poverty rates:

Family Size	Metro	Non-metro	Poverty Rate
1	$ 5,450	$ 5,380	$ 6,260
2	8,930	8,819	8,420
3	12,260	12,100	10,560
4	15,130	14,930	12,700
5	17,860	17,620	14,840
6	20,880	20,610	16,980

Youth Labor Force Expected to DeclineThis Summer; Jobs May Shrink in 2 Arizona Programs

The 16-to-24-year-old labor force, which expands sharply every summer, is expected to reach 24 million this July, about 930,000 below the level of last summer, says the U.S. Department of Labor's Bureau of Labor Statistics.

This over-the-year decline stems principally from a continued decline in the 16-to-24-year-old population. The size of this population group has fallen throughout the 1980s and will be about 730,000 smaller this July than last. In addition, the proportion of youth in the labor force is expected to be slightly below the record-high 77.5 percent rate of last July.

In Arizona, two major summer employment programs for youth expect to offer about the same number or slightly fewer jobs than last year. But a larger emphasis on remedial and vocational education, plus an increase in the minimum wage (from $3.35 to $3.80 an hour) will likely lower youth workers' hours and earnings in these programs.

Despite a 6 percent increase in funding (to $10.6 million), summer jobs from the Job Training Partnership Act (JTPA) program are likely to fall slightly, due to the minimum-wage hike and an emphasis on more "basic skills" training, says David Van Wagner, director of Management Information Systems for the Arizona JTPA office. Following a policy move of the past two years, JTPA summer employment has been "serving fewer and serving more intensely," Van Wagner says.

In 1989, the JTPA program, which recruits directly from the schools, employed about 7,900 students ages 14 to 21. Van Wagner expects 500 fewer will be served this year.

Meanwhile, the director of the Arizona Alliance of Business' Summer Jobs for Youth Campaign reports that results from their yearly solicitation of private businesses are mixed. While the number of jobs offered is up slightly from 1989 (700 vs. 670), the percentage of minimum-wage jobs has increased and the number of hours has dropped, says Emmett McNulty.

Most of the jobs secured by the campaign have 25- to 35-hour work weeks, compared to mainly 40-hour-a-week jobs last year, and pay an average of $4.25 to $5 an hour, which is up slightly from 1989.

The Arizona Labor Force in March

Arizona's unemployment rate climbed sharply in March — moving up to the national rate of 5.2 percent — as 7,900 more people became unemployed in the month. The rise in unemployed was due to an increase of 3,300 in the labor force and a decline in employment of 4,600.

Despite the loss in residence-based employment, total wage and salary jobs increased 7,300. But the increase was a seasonally weak amount given that 10,800 has been the average March gain during this going-on-eight-year period without a recession. March normally brings increased construction activity as well as substantial gains by trade and services. This year, construction, trade, and services all had weaker-than-average March increases.

Nevertheless, over-the-year job growth in Arizona — at 2.8 percent — was still ahead of the national rate of 2.3 percent. Arizona's annual job growth dropped off to 40,800 jobs from 47,700 in February.

We can't rejoice, however, in Arizona's first construction increase in eight months. An 800 gain in March does not a construction recovery make. The seasonal increase for March is normally about 2,000. Pima County, though, probably believes that the state and Maricopa County should count their blessings, since it posted a 100 loss in construction against gains by Maricopa County (500) and nonmetropolitan counties (400). Pima County has not had a construction employment loss in March in at least eight years.

Because construction industry growth is so closely tied to interest rates, DES, Research Administration does not anticipate much improvement in the months ahead. The inflation-fighting hawks on the Federal Open Market Committee (FOMC) have the upperhand from recent economic events, so there is little chance for lower interest rates.

Trade's anemic 700 gain was weak at both the wholesale and retail levels. Wholesale trade gained 300, half the average March gain, and retail trade gained 400, about one-quarter the average gain in March.

Food stores were responsible for the weakness in retail trade, losing 600 in March after a 1,300 loss in February. Some of this loss was from new stores paring back after grand-opening bonanzas, while other losses were from established stores getting lean and mean to face the new competition.

Restaurants and bars enabled retail trade to have an employment gain, posting 1,100 new jobs. Still, this was 400 under

(Continued on page 12)

	ARIZONA				
				Amount	Change
	Mar.* 1990	Feb. 1990	Mar. 1989	Feb.-Mar.	1989-1990
TOTAL CIVILIAN LABOR FORCE**	1698.4	1695.1	1060.4	+3.3	-11.3
Total Unemployment	87.4	79.5	97.4	+7.9	-10.0
Rate	5.1	4.7	5.7	—	—
Rate (Sea. Adj.)***	5.2	4.8	5.8	—	—
Total Employment	1611.0	1615.6	1612.3	-4.6	-1.3

Note: **Above Labor Force Statistics Should Not Be Used for Economic Assistance Programs**

NONAGRICULTURAL WAGE AND SA

TOTAL WAGE AND SALARY	1505.4	1498.1	1464.6	+7.3	+40.8
Manufacturing	187.5	187.5	188.0	+0.0	-0.5
Durable Goods	141.8	141.9	143.0	-0.1	-1.2
Stone, Clay, and Glass	7.4	7.4	7.2	+0.0	+0.2
Primary and Fabricated Metals	15.7	15.8	15.5	-0.1	+0.2
Primary Metals	7.8	7.8	7.8	+0.0	+0.0
Fabricated Metals	7.9	8.0	7.7	-0.1	+0.2
Machinery	58.9	59.3	62.3	-0.4	-3.4
Aircraft and Missiles	26.6	26.3	25.5	+0.3	+1.1
Lumber and Wood Products (Excluding Furniture)	7.5	7.6	6.8	-0.1	+0.7
Nondurable Goods	45.7	45.6	45.0	+0.1	+0.7
Food and Kindred Products	9.7	9.7	9.2	+0.0	+0.5
Printing and Publishing	16.8	16.7	16.8	+0.1	+0.0
Mining and Quarrying	12.7	12.7	12.1	+0.0	+0.6
Copper Mining	9.7	9.7	9.1	+0.0	+0.6
Construction	81.3	80.5	85.4	+0.8	-4.1
Trans., Communications, & Public Utilities	80.1	78.9	75.8	+1.2	+4.3
Transportation	43.9	43.5	39.5	+0.4	+4.4
Communications and Public Utilities	36.2	35.4	36.3	+0.8	-0.1
Trade	376.8	376.1	366.7	+0.7	+10.1
Wholesale Trade	78.4	78.1	74.6	+0.3	+3.8
Retail Trade	298.4	298.0	292.1	+0.4	+6.3
General Merchandise and Apparel	45.3	45.5	44.2	-0.2	+1.1
Food Stores	49.1	49.7	47.7	-0.6	+1.4
Automotive and Service Stations	35.3	35.1	34.7	+0.2	+0.6
Eating and Drinking Places	107.3	106.2	105.9	+1.1	+1.4
Finance, Insurance, and Real Estate	93.9	93.6	92.3	+0.3	+1.6
Services and Miscellaneous	408.1	405.8	389.4	+2.3	+18.7
Hotels and Lodging Places	46.5	45.7	43.8	+0.8	+2.7
Business Services	75.8	75.4	72.6	+0.4	+3.2
Health Services	100.1	99.9	96.6	+0.2	+3.5
Government	265.0	263.0	254.9	+2.0	+10.1
Federal	46.0	45.9	44.3	+0.1	+1.7

* Preliminary
** Labor force, unemployment, and employment are reported by place of residence.
*** Normal seasonal variations have been eliminated to reflect underlying economic trends.
**** Business Services undergoes a series break between December 1987 and January 1988 as a result of the 1987 SIC realignment.

rce and Employment

(in thousands)

MARICOPA COUNTY					PIMA COUNTY				
			Amount	Change				Amount	Change
Mar.* 1990	Feb. 1990	Mar. 1989	Feb.- Mar.	1989 1990	Mar.* 1990	Feb. 1990	Mar. 1989	Feb. Mar.	1989 1990
1051.8	1051.5	1060.4	+0.3	-8.6	308.1	308.5	318.4	-0.4	-10.3
45.3	40.3	50.8	+5.0	-5.5	12.7	11.6	15.6	+1.1	-2.9
4.3	3.8	4.8	—	—	4.1	3.8	4.9	—	—
4.3	3.9	4.7	—	—	4.1	3.7	4.9	—	—
1006.5	1011.2	1009.6	-4.7	-3.1	295.4	296.9	302.8	-1.5	-7.4
ARY EMPLOYMENT BY PLACE OF WORK									
992.3	988.9	968.1	+3.4	+24.2	256.1	255.0	253.7	+1.1	+2.4
139.3	139.4	139.2	-0.1	+0.1	26.7	26.5	28.9	+0.2	-2.2
106.7	106.9	106.9	-0.2	-0.2	21.2	21.1	23.4	+0.1	-2.2
4.5	4.5	4.4	+0.0	+0.1					
10.7	10.8	10.5	-0.1	+0.2					
48.6	49.1	50.7	-0.5	-2.1					
32.6	32.5	32.3	+0.1	+0.3	5.5	5.4	5.5	+0.1	0.0
6.6	6.6	6.2	0.0	+0.4					
12.1	12.0	12.1	+0.1	+0	.0				
1.0	1.0	0.9	+0.0	+0.1	2.2	2.2	2.0	+0.0	+0.2
54.3	53.8	58.4	+0.5	-4.1	14.2	14.3	15.1	-0.1	-0.9
55.7	55.5	52.7	+0.2	+3.0	9.6	9.5	9.2	+0.1	+0.4
32.8	32.7	29.5	+0.1	+3.3	4.9	4.8	4.4	+0.1	+0.5
22.9	22.8	23.2	+0.1	-0.3	4.7	4.7	4.8	+0.0	-0.1
253.8	253.9	248.5	-0.1	+5.3	59.6	59.6	58.6	+0.0	+1.0
62.0	61.9	59.4	+0.1	+2.6	7.7	7.7	7.4	+0.0	+0.3
191.8	192.0	189.1	-0.2	+2.7	51.9	51.9	51.2	+0.0	+0.7
28.2	28.5	28.0	-0.3	+0.2	6.9	6.9	7.3	+0.0	-0.4
31.5	31.9	30.6	-0.4	+0.9	8.0	8.1	8.1	-0.1	-0.1
22.4	22.3	21.9	+0.1	+0.5	5.7	5.7	5.6	+0.0	+0.1
68.9	68.3	68.2	+0.6	+0.7	19.8	19.8	19.8	+0.0	+0.0
75.6	75.3	74.0	+0.3	+1.6	11.3	11.3	11.5	+0.0	-0.2
276.7	275.2	264.3	+1.5	+12.4	74.8	74.6	72.2	+0.2	+2.6
29.4	29.0	27.2	+0.4	+2.2	7.1	7.1	7.0	+0.0	+0.1
61.0	60.6	58.9	+0.4	+2.1	10.1	10.2	9.9	-0.1	+0.2
64.9	64.8	62.5	+0.1	+2.4	21.7	21.5	21.3	+0.2	+0.4
135.9	134.8	130.1	+1.1	+5.8	57.7	57.0	56.2	+0.7	+1.5

NOTE: Prepared by Arizona Dept. of Economic Security, Research Administration, in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics.

Estimated Hours and Earnings of Production Workers in Selected Industries Arizona

INDUSTRY	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	Mar.* 1990	Feb. 1990	Mar. 1989	Mar.* 1990	Feb. 1990	Mar. 1989	Mar.* 1990	Feb. 1990	Mar. 1989
Manufacturing	418.40	414.51	402.87	41.1	41.0	40.9	10.18	10.11	9.85
Aircraft & Missiles	649.74	637.46	601.04	45.5	45.5	44.0	14.28	14.01	13.66
Food & Kindred Prod.	327.08	332.09	333.72	38.8	39.3	40.5	8.43	8.45	8.24
Primary Metals	490.27	477.97	51.78	37.8	37.4	39.6	12.97	12.78	13.05
Machinery	384.46	375.72	397.36	38.6	38.3	40.3	9.96	9.81	9.86
Copper Mining	591.91	576.63	556.38	43.3	43.0	42.7	13.67	13.41	13.03
Construction	437.55	422.80	423.40	36.8	35.8	35.7	11.89	11.81	11.86
Utilities	761.69	726.77	656.99	43.6	44.1	39.2	17.47	16.48	16.76
Retail Trade**	259.25	257.21	247.41	32.9	32.6	32.9	7.88	7.89	7.52
Wholesale Trade	372.66	380.32	364.43	38.3	38.3	38.2	9.73	9.93	9.54

Estimated Hours and Earnings of Production Workers in Selected Industries Maricopa County

INDUSTRY	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	Mar.* 1990	Feb. 1990	Mar. 1989	Mar.* 1990	Feb. 1990	Mar. 1989	Mar.* 1990	Feb. 1990	Mar. 1989
Manufacturing	447.62	435.72	427.63	41.6	41.3	41.0	10.76	10.55	10.43
Construction	454.69	442.73	443.09	37.3	36.2	36.2	12.19	12.23	12.24
Retail Trade**	270.01	268.07	267.69	33.5	33.3	34.1	8.06	8.05	7.85
Wholesale Trade	386.08	395.68	382.69	38.0	37.9	38.5	10.16	10.44	9.94

Estimated Hours and Earnings of Production Workers in Selected Industries Pima County

INDUSTRY	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	Mar.* 1990	Feb. 1990	Mar. 1989	Mar.* 1990	Feb. 1990	Mar. 1989	Mar.* 1990	Feb. 1990	Mar. 1989
Manufacturing	346.16	350.04	369.40	36.4	36.5	38.6	9.51	9.59	9.57
Construction	371.47	371.47	393.02	36.1	36.1	36.8	10.29	10.29	10.68
Utilities	599.78	593.54	579.10	38.3	39.1	41.1	15.66	15.18	14.09

* Preliminary.

** Excludes eating and drinking places.

Note: These estimates are based on a sample of full- and part-time production and related employees whose payroll and hours are reported for the pay period which includes the 12th of the month. Prepared in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

Nonmetropolitan Counties
Labor Force and Employment
March 1989

	Apache	Cochise	Coco-nino	Gila	Graham	Green-lee	La Paz
CIVILIAN LABOR FORCE*	14,475	35,600	44,650	12,775	7,775	2,775	5,900
Total Unemployment	2,075	2,475	3,075	1,400	650	225	450
Rate	14.3%	7.0%	6.9%	11.0%	8.4%	8.1%	7.6%
Rate (Seas. Adj.)**	15.0%	6.6%	7.0%	10.0%	8.1%	8.3%	7.7%
Total Employment	12,400	33,125	41,575	11,375	7,125	2,550	5,450
THE ABOVE LABOR FORCE STATISTICS SHOULD NOT BE USED FOR ECONOMIC ASSISTANCE PROGRAMS							
TOTAL WAGE AND SALARY	15,275	26,750	42,325	11,225	5,050	2,800	4,000
Manufacturing	875	1,225	3,275	1,450	225	25	325
Mining & Quarrying	50	150	325	1,325	0	1,625	75
Construction	625	775	1,725	325	175	100	175
T.C.P.U.	2,200	1,850	3,075	450	175	50	150
Trade	1,850	5,750	9,450	2,550	1,325	225	1,325
F.I.R.E.	450	675	675	300	100	25	100
Services & Misc.	4,225	5,100	11,075	2,125	850	125	950
Government	5,000	11,225	12,725	2,700	2,200	625	900

	Mohave	Navajo	Pinal	Santa Cruz	Yavapai	Yuma
CIVILIAN LABOR FORCE*	35,750	28,150	38,500	12,150	39,050	60,900
Total Unemployment	1,900	3,200	3,000	1,075	2,050	7,800
Rate	5.3%	11.4%	7.8%	8.8%	5.2%	12.8%
Rate (Seas. Adj.)**	5.1%	11.3%	7.7%	10.2%	4.7%	18.4%
Total Employment	33,850	24,950	35,500	11,075	37,000	53,100
THE ABOVE LABOR FORCE STATISTICS SHOULD NOT BE USED FOR ECONOMIC ASSISTANCE PROGRAMS						
TOTAL WAGE AND SALARY	26,375	22,275	30,875	12,075	27,875	30,075
Manufacturing	2,575	1,875	3,975	1,175	2,200	2,325
Mining & Quarrying	25	1,200	3,725	0	825	75
Construction	3,075	1,200	675	375	2,300	1,350
T.C.P.U.	1,150	1,675	1,075	775	1,075	1,075
Trade	8,025	4,325	6,300	5,575	7,550	9,125
F.I.R.E.	1,200	400	850	300	950	950
Services & Misc.	6,050	5,475	4,650	2,000	7,025	7,000
Government	4,275	6,125	9,625	1,875	5,950	8,175

* Adjusted to the Current Population Survey (CPS) to reflect place of residence.

** Seasonal adjustment not applicable for economic assistance programs.

T.C.P.U. = Transportation, Communications, and Public Utilities

F.I.R.E. = Finance, Insurance, and Real Estate

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

Arizona Labor Force and Employment for Economic Assistance Programs March 1990

County	Civilian Labor Force	Employment	Unemployment	Rate
Statewide	1,698,414	1,611,034	87,380	5.1%
Apache	14,478	12,396	2,082	14.4
Cochise	35,592	33,115	2,477	7.0
Coconino	44,634	41,568	3,066	6.9
Gila	12,767	11,375	1,392	10.9
Graham	7,780	7,133	647	8.3
Greenlee	2,767	2,544	223	8.1
La Paz	5,910	5,454	456	7.7
Maricopa	1,051,881	1,006,540	45,341	4.3
Mohave	35,750	33,843	1,907	5.3
Navajo	28,141	24,941	3,200	11.4
Pima	308,099	295,447	12,652	4.1
Pinal	38,501	35,508	2,993	7.8
Santa Cruz	12,157	11,080	1,077	8.9
Yavapai	39,045	36,993	2,052	5.3
Yuma	60,910	53,098	7,812	12.8

These figures are the only official BLS labor statistics to be used for revenue sharing purposes. They are not designed to be used as economic indicators.

NOTE: Series for Yuma and La Paz counties start January 1983. Data are not comparable to any past series.

The Arizona Labor Force in March

(Continued from page 7)

the March average and less than half last year's March gain. Some part of this weakness may be due to the baseball lockout, but there is no way to tell how much.

Weakness in services was apparent throughout its component industries, but especially among health services. As a whole the industry gained 2,300, or 1,200 less than the March average. Hotels and other lodging places picked up 800, about 100 below average. This was the first winter season with no major new resorts opening after two years where several large hotels came on line. Business services' growth in March also came in 100 under average, posting a 400 gain. Health services added only 200 when 500 is normal.

Answers about the economic impact of a reduced spring training schedule are not discernable from March employment figures. Baseball employment would be found among "amusement services," which is buried in the residual of "other services." Amusement services also includes race track employment (horse, dog, stock car, Grand Prix) as well as golf courses, and miscellaneous categories such as archery ranges, pool halls, shooting ranges, and ski rentals.

Were any industries star performers in March? Only one. Transportation, communications, and public utilities (TCPU) posted a 1,200 gain, more than double the usual average. Two-thirds of that gain was by public utilities and was attributable to maintenance of facilities in northern counties.

Manufacturing remained static over-the-month, which is not bad considering that manufacturing is losing employment nationally. But it is not good considering that there has been an average 500-employment gain in March since 1982. Machinery manufacturing lost 400 while aircraft and missiles manufacturing picked up 300.

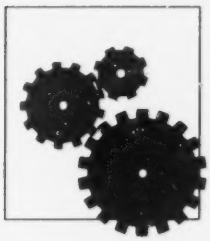
Government gained 2,000, an average March increase despite some staffing-up for the 1990 census. The impact of census employment should be revealed in April statistics.

— Ron Simon
RA Economic Analysis Manager

New Developments

"New Developments" is featured each month as a service to our readers. This section is a compilation of public announcements and articles from newspapers and periodicals about events significant to Arizona labor markets. Due to space limitations, however, an exhaustive list of business news is not possible. In addition, the Arizona LMI Newsletter is not responsible for incorrect information reported by these sources.

MANUFACTURING — **RePak Surgical Co.**, a joint venture of Marriott Corp. and Standard Textile Co., will build a plant in Tempe to reprocess recyclable surgical garments. The RePak facility, scheduled to open in the fall, will operate out of an existing 12,000-square-foot building at the Broadway Industrial Park, Southern Avenue and Hardy Drive, and will employ about 50 workers when its fully functional. Most hospitals currently use disposable garments and drapes in operating rooms, which must be treated as hazardous waste.



Garrett Airline Services Division of Phoenix has begun construction on two buildings at 47th Street and Hammond Lane, near Sky Harbor International Airport, that will cost nearly $8 million. A 55,000-square-foot facility, which will be used for repair and overhaul of auxiliary power units, will open in September and employ 200, but its work force is expected to double in five years. Also, a 31,000-square-foot machine shop is expected to open in late 1991 and employ 40, and its work force should increase to between 320 and 350 within five years. Garrett, a division of Allied-Signal Aerospace Co., specializes in building and repairing turbine jet engines.

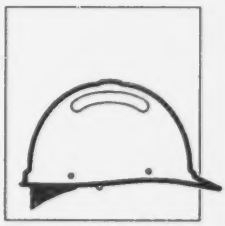
A U.S. Bankruptcy Court has approved the sale of **Learjet Corp.** by Integrated Resources Inc. to a Canadian corporation that develops and manufactures a variety of transportation equipment, including large business jets. Wichita, Kan.-based Learjet has customer service, aircraft refurbishing and used aircraft sales operations in Tucson that employ 300. Meanwhile, the Tucson facility will increase its work force by 35 before June because of an $11 million Air Force contract it was awarded to install digital electronic engine computers and ground proximity warning systems into C-21A jets.

In early May, **EECO Inc.** laid off about one-third of a 100-employee work force at its Tucson computer keyboard plant. Southern California-based EECO, which is in the middle of a bankruptcy reorganization, says it will need fewer employees because it plans to make only custom keyboards instead of mass-produced ones. EECO says it has lost $20 million over the past two years because of increased competition from foreign competitors.

Micro Metallics Corp., a San Jose, Calif., recycling company, has opened a warehouse in Chandler for collection and processing of discarded computers and electronics equipment. For now, however, the company will ship the high-tech "junk" to California for processing where valuable metals — gold, silver, platinum — will be extracted.

Lockheed Aeromod Center Inc. expects to employ several more hundred workers than first anticipated at an aircraft maintenance facility it's building at Tucson International Airport. The 300,000-square-foot maintenance center, which should open in December, will initially have 185 employees, then expand to 560 a year later and swell to 900 by the end of 1993. The facility's primary occupational need will be airframe mechanics (40 initially and 200 in three years), with Lockheed planning to set up a training program for those positions at Pima Community College and guaranteeing employment upon graduation.

CONSTRUCTION — **Phoenix-area housing permits** for single-family and multi-family units in 1989 plunged 36 percent from '88 levels and were 50 percent below 1987 totals, according to the Home Builders Association of Central Arizona. A total of 13,480 housing permits were issued last year, compared to 21,091 in '88, and 27,024 in '87.



Sky Harbor International Airport has begun talks with **Tishman Realty and Construction Co.** about building a $30 to $40 million, 300-room **Westin hotel** on land west of Terminal 1 where a TraveLodge Hotel was located before it was torn down last year.

Ground has been broken on a **$10.3 million domed stadium** that will be used for high school athletics and other indoor events for the communities of Springerville and Eager. **Sletten Construction** was awarded the contract for the Round Valley Ensphere, which will include 120,000 square feet of unobstructed floor space. Completion of the project is expected in June 1992.

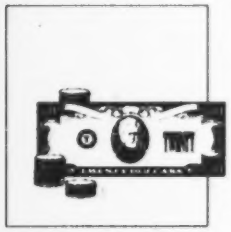
Dallas-based **Trammell Crow Co.** plans to build five retail centers (with 1.2 million of square feet) in the Phoenix metropolitan area over the next two years — three in the East Valley. The projects include: the 400,000-square-foot

(Continued on page 14)

(Continued from page 13)

Spectrum Festival Center, Interstate 10 and Baseline Road; a 140,000-square-foot development anchored by an Albertson's food store at Broadway and Power roads in Mesa; a 160,000-square-foot retail center at Kyrene and Warner roads in Tempe; a 400,000-square-foot development next to the Westridge Festival Center, 75th Avenue and Thomas Road in west Phoenix; and a 120,000-square-foot center anchored by an Albertson's at Tatum Boulevard and Greenway Road in north Phoenix.

FINANCE, INSURANCE and REAL ESTATE — **Reynolds Metals Co.** of Richmond, Va., plans in early August to move its **Western Regional Credit Office** from Los Angeles to Scottsdale. The Reynolds unit, which will be located at the Gainey Ranch Corporate Center, 8777 N. Gainey Ranch Center Dr., will be responsible for credit approvals and collections for 10 western states. Initially, the company will hire about 15 clerical and support workers from the Valley.



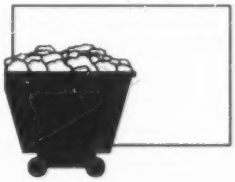
SERVICES — **Phoenix Memorial Health Resources** has become the third hospital group in recent months to take the advice of a famous author and head west, the west Valley, that is. The parent company of Phoenix Memorial Hospital says it plans to build over a period of 15 years a 36-acre medical complex in Goodyear on the southeast corner of McDowell and Litchfield roads. The project, which will be developed in three parts, will include a primary care unit and outpatient surgery center, an occupational and industrial medical center, a child development center, nursing care facilities, and a 110-bed hospital. In March, St. Joseph's Hospital and Medical Center, and Samaritan Health Services announced plans for major medical projects (see April 1990 issue of *Arizona LMI Newsletter*) in the surrounding area, which is being developed as a master-planned community .

Officials of **Yavapai Regional Medical Center** (YRMC) met with employees in early May concerning possible additional layoffs due to continuing losses from sharp declines in patient loads. In late April, YRMC eliminated 37 full-time positions.

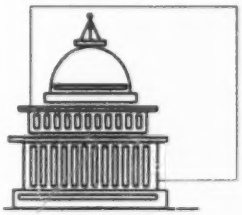
Although the state lost out to Texas for the supercollider project, the Mountain States Regional Office of the engineering firm of **Parsons Brinckerhoff Quade and Douglas Inc.**, located in Tempe, has been selected as lead designer of the $6 billion project's underground tunnel. The engineering firm's track record on designing tunnels and underground excavation played a major role in landing the project, Regional Manager David French says.

Occupancy rates at hotels in Phoenix and Tucson rose slightly in 1989, while in Flagstaff rates fell four percentage points below their high levels of 1987, according to the annual *Arizona Lodging Survey*. Occupancy rates at Tucson resorts and first-class, non-resort hotels in 1989 were 65 percent and 63 percent, respectively, both up 1 percent over 1988. Employment levels in the Pima County hotel industry, however, have remained about the same during the past two years, compared to double-digit growth in the mid-1980s, as hotels try to cut costs. In Phoenix, resort occupancy increased to 64.7 percent, up 4 percentage points, while first-class, non-resort hotels improved to 62 percent from 59 percent. Flagstaff's strongest hotel group — economy class — was at 73 percent in 1989, down from 77 percent two years earlier, and is expected to fall to 63 percent this year due to the addition of 400 rooms.

MINING — The **copper mining industry** put $1.25 billion into the Arizona economy in 1989 in the form of wages, purchases, utility and construction costs, taxes, and dividends, according to the Arizona Mining Association. In addition, copper mining employment in 1989 grew by 900 over the previous year to 10,400 workers, the association says. Major reason for the increases: rising price per pound for cathode copper — $1.30 in 1989, up 10 cents from 1988.



GOVERNMENT — **Davis-Monthan Air Force Base** in Tucson, which has 7,500 military and civilian employees, is one of two alternative choices being considered for closure by the Air Force as part of cost-cutting measures by the military. Defense Secretary Dick Cheney has proposed Myrtle Beach Air Force Base in South Carolina as the Pentagon's first choice. Arizona's congressional delegation says it's unlikely the base will be closed because of the its good-weather location and use as a storage center for 3,000 mothballed aircraft.



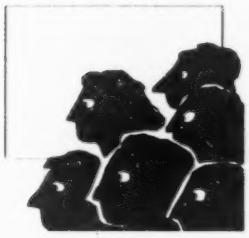
Despite vehement public protest, the governing board of the

(Continued on page 15)

(Continued from page 14)

Tuba City Public Schools (on the Navajo Indian Reservation) voted in April to cut 172 staff jobs for next school year due to a budget shortfall. Several teachers, however, say they plan to take legal action against the board for firing them without notification, and the board has also been accused of violating the Arizona Open Meetings Law by a Flagstaff newspaper.

TRADE — **K mart** has targeted Arizona for four of 50 to 70 prototype stores it's building as part of a $2.3 billion project to upgrade the retail giant's image and help it compete against rivals such as Wal-Mart. The planned stores — three in the Phoenix area, one in Green Valley — sport a different design and have 30 to 50 percent more space. K mart, which has 32 stores in the state, also plans to expand outlets in Yuma and Casa Grande.



A San Francisco investment company, the **Levin Group**, is buying the **The O'Malley Cos.**, the 83-year-old family-owned building-supply company that has five stores in the Valley. The O'Malley Cos., which has suffered a downturn in sales due to increased competition from HomeClub and The Home Depot, was sold to a Phoenix contractor and two O'Malley's executives last year, but the deal fell through when the group was unable to come up with financing. No details are available on how the sale will affect employment.

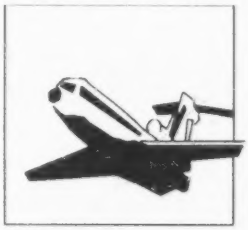
Carl Karcher Enterprises Inc. of Anaheim, Calif., is considering selling or franchising its 40 **Carl's Jr.** fast-food restaurants in Arizona, which the company says are losing $5 million a year. The Southern California-based chain had announced 18 months ago plans to expand to 80 outlets in the state.

Yavapai County Board of Supervisors has approved zoning for a **175,000-square-foot shopping center** in **Dewey** that will be anchored by an IGA Food Store and probably a drugstore. Developer of the project, Jake Weber of Sedona, expects the grocery store to be complete in a year, but has not decided what other stores will be in the development, which will be on the west side of Highway 69 between Aztec Drive and Bradshaw Mountain Road.

Arizona Mail Order Co. Inc.'s purchase of a Phoenix business — **Ambassador** — will bring 200 to 300 jobs to Tucson over the next year, its home base, says the clothing mail-order company. Arizona Mail Order, which operates under the name of **Old Pueblo Traders**, says it will hire workers almost entirely from the Tucson area, adding to its current work force of about 1,000, employed in four catalog centers around Tucson.

Everything Yogurt, which features soups, salads, and sandwiches, plus its namesake, has opened the first of four locations in the Valley at Fiesta Mall. Other locations planned are at the Superstition Springs Center in Mesa, the Arizona Center in downtown Phoenix, and the Scottsdale Fashion Square, Scottsdale and Camelback roads.

TRANSPORTATION, COMMUNICATIONS AND PUBLIC UTILITIES (TCPU) — About 350 **Arizona Public Service Co.** (APS) employees accepted an early retirement plan that will save the state's largest utility nearly $17 million. APS, which currently has 7,500 employees, plans to reduce its work force this year by an additional 150 through attrition, bringing to 1,500 the number of employees who have been laid off or accepted early retirement since 1988. The state's other major utility, Salt River Project, laid off nearly 700 employees in 1989 as part of a cost-cutting plan.



American Airlines has brightened the employment skyline in Tucson by announcing it will move a "satellite" reservations center from Los Angeles to the "Old Pueblo" that initially will employ 500 and eventually grow to 800 or 1,000 workers. American says the pay range for the facility's workers — primarily reservations agents — will be between $6 and $16, about the same levels currently being paid to the airline's L.A. workers.

MISCELLANEOUS — The state's Commerce Department has designated four "economically depressed" areas of Arizona as enterprise zones. Companies that start businesses and hire employees in these areas can receive financial incentives — primarily tax credits — and the zones will also offer training, marketing and speeded-up permit processing. The four areas selected were: Yuma, Navajo and Santa Cruz counties, along with south Phoenix.

According to M/PF Research Inc. of Dallas, the **Valley ranked 10th in employment growth** among metropolitan areas in 1989, adding 30,400 jobs. Leading the country in job growth was Los Angeles with 79,800 jobs, followed by Washington D.C., Seattle, Houston, San Diego, Minneapolis, Oakland, Chicago, and Cincinnati.

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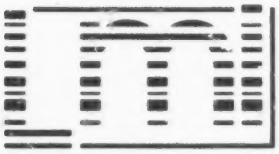

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